



USDA Foreign Agricultural Service

# GAIN Report

Global Agriculture Information Network

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## Turkey

### Cotton and Products

### Cotton update

### 2005

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**Report Highlights:**

MY 2005 Turkish cotton production is expected to be about 800,000 MT. Optimum weather conditions during the season ensured good quality. During MY 2004 Turkey experienced a record domestic consumption and imports. Domestic consumption exceeded 1.5 MMT and imports reached 675,000 MT during the first eleven months of the marketing year. The US cotton continued to be preferred by Turkish mills and constituted 60 percent of the imports. Year-end total imports expected to reach 700,000 MT.

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Includes PSD Changes: Yes  
Includes Trade Matrix: Yes  
Quarterly Report  
Ankara [TU1]  
[TU]

**Production**

The MY 2005 Turkish cotton crop is reported to be developing well due to optimum weather conditions during the growing season. Total production will be about 800,000 MT despite the decline in planted area due to farmers' dissatisfaction with cotton's profitability compared with other crops. Turkish farmers are looking to lower production costs in order to compete with imported cotton. It is reported that an increasing number of harvesters are being imported to Turkey to avoid the high labor costs.

**Consumption**

Turkey is experiencing the highest domestic utilization of cotton during MY 2004 despite the slow down in cotton yarn business during the summer months. Total cotton consumption in coming years will depend on the ability of Turkish textile companies to compete with China in international markets. Turkish yarn producers are competing with India, Pakistan and Central Asian Countries for cotton yarn exports. Turkish textile exports during the first half of the year showed an increase but slowed in July. The over-valued Turkish Lira is hurting textile and cotton yarn exports.

**Trade**

Turkey imported a record 675,500 MT of cotton during the first eleven months of MY 2004. The United States supplies 60 percent of the import market followed by Greece. Thus far it is difficult to assess how changes in USDA Export Guarantee program or U.S. domestic policies will affect future import levels.

Turkey Cotton (HECTARES)(MT)						
	2003 USDA Official [Old]	Revised Post Estimate [New]	2004 USDA Official [Old]	Estimate Post Estimate [New]	2005 USDA Official [Old]	Forecast Post Estimate [New]
Market Year Begin		08/2003		08/2004		08/2005
Area Planted	0	710000	0	700000	0	600000
Area Harvested	710000	710000	700000	700000	630000	600000
Beginning Stocks	297197	193925	278255	216290	387118	281290
Production	892679	900000	903565	925000	805588	800000
Imports	516012	499315	783816	700000	718498	675000
MY Imp. from U.S.	0	0	0	0	0	0
TOTAL SUPPLY	1705888	1593240	1965636	1841290	1911204	1756290
Exports	77728	76950	32659	35000	32659	25000
USE Dom. Consumption	1349905	1300000	1545859	1525000	1524086	1475000
Loss Dom. Consumption	0	0	0	0	0	0
TOTAL Dom. Consumption	1349905	1300000	1545859	1525000	1524086	1475000
Ending Stocks	278255	216290	387118	281290	354459	256290
TOTAL DISTRIBUTION	1705888	1593240	1965636	1841290	1911204	1756290

## Import Trade Matrix

**Country** Turkey

**Commodity** Cotton

Time Period	Aug/July	Units:	Aug/June
Imports for:	MY 2003		MY 2004
U.S.	307441	U.S.	405585
Others		Others	
Greece	77490	Greece	153345
Syria	31388	Syria	46177
Turkmenistan	26411	Uzbekistan	15676
Mersin Free Zone	14964	Turkmenistan	11947
Iraq	8554	Israel	7813
Israel	7354	Egypt	7117
Azerbaijan	6028	Mersin Free Zone	4556
Egypt	5338	Azerbaijan	4186
Uzbekistan	3141	Uganda	3094
Ethiopia	2600	Kazakhstan	2965
Total for Others	183268		256876
Others not Listed	8604		13073
Grand Total	499313		675534

## Export Trade Matrix

**Country** Turkey

**Commodity** Cotton

Time Period	Aug/July	Units:	Aug/June
Exports for:	MY 2003		MY 2004
U.S.		U.S.	
Others		Others	
Mersin Free Zone	19457	Mersin Free Z.	6343
Italy	12158	Italy	6057
Germany	4261	Netherlands	3700
Bangladesh	4139	Kayseri Free Z.	2326
Portugal	3868	Portugal	2004
Netherlands	3754	Greece	1651
France	3611	France	1507
China	3541	Thailand	1445
Kayseri Fee Z.	2729	Hungry	867
Greece	2080	Russia	717
Total for Others	59598		26617
Others not Listed	17348		4814
Grand Total	76946		31431